User Guide for CDAP Smart Card Electronic Claims Submission

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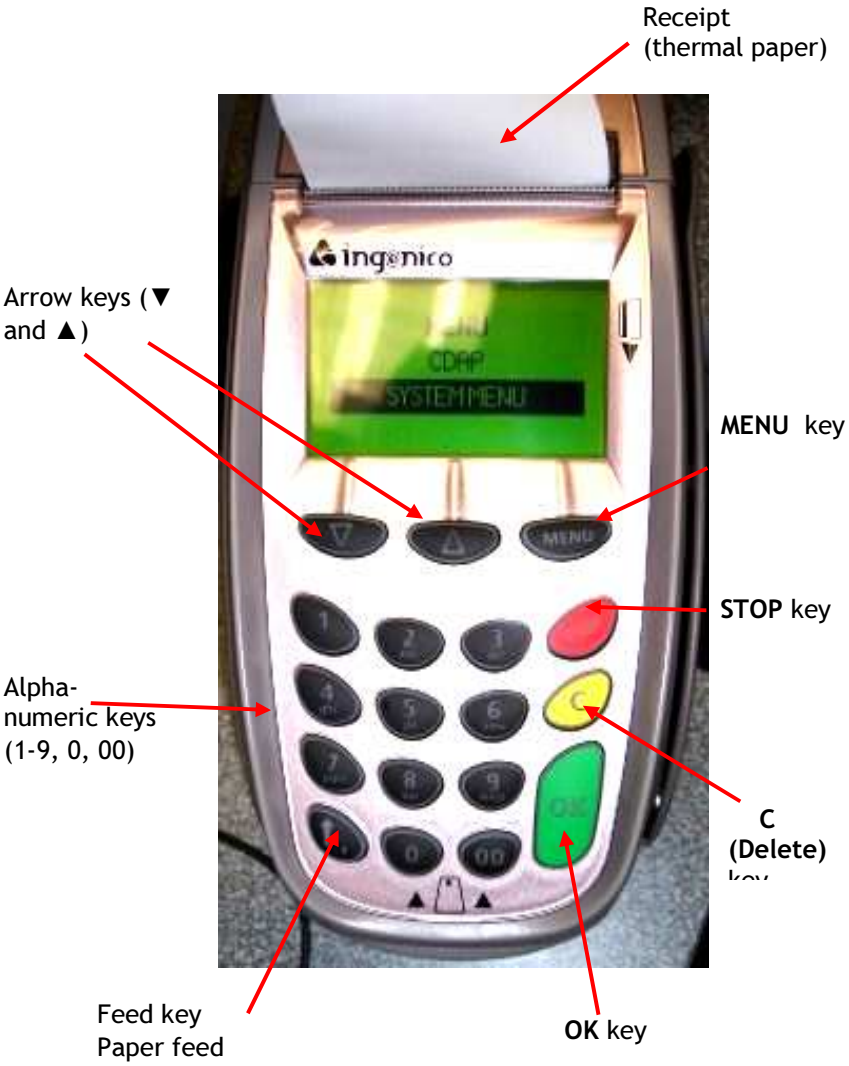
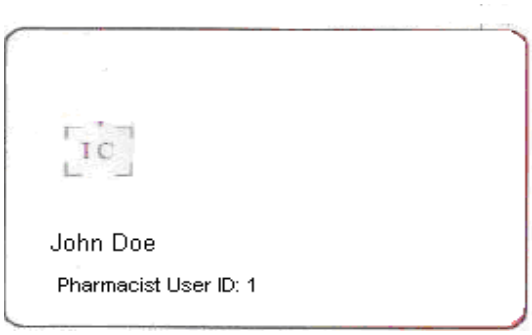
Getting to Know Your Terminal



Claims and Patient Services

The CDAP Pharmacist Smart Card

The Pharmacist card is a card issued to a pharmacist and it is **ONLY** to be used by the pharmacist to whom the card was issued. It is clearly distinguishable from the patient's card as it is a plain white card which contains the pharmacist's name and pharmacist user id just below the integrated smart card chip. See picture below:

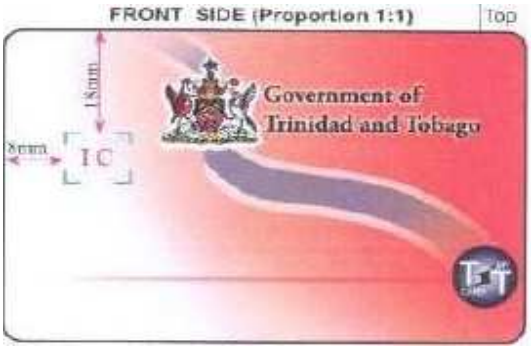


When inserting this card into the terminal, the pharmacist must ensure that they insert it chip first into the terminal with the chip side facing up. The pharmacist must take note that he/she cannot simply take his/her card and insert it into any terminal that has the CDAP application installed on it. In order for the pharmacist to use a valid card, he/she **MUST** be registered on the terminal in which he/she wants to use it! Once registered, the pharmacist can login successfully!

A pharmacist also has to be valid for his/her login to be successful as well. When the pharmacist's card is first issued, and as long as he is registered on the terminal, a first use validation is done. This means, when the user inserts the card for the very first time into the terminal, the pharmacist would be asked to validate the card online. By pressing **OK,** the terminal would begin dialing to the remote computer to validate the card. As long as a return message states that the card is valid, then the logon is allowed to proceed. If however, the return message is Invalid, the card is blocked and the user is automatically blocked on the terminal as well. This would have the effect of the user not being allowed to perform a manual login! It should be noted that a pharmacist goes through an automatic validation every thirty (30) days. A pharmacist can also be made inactive in which case he/she would not be able to use the card and it would be made invalid as well as blocked on the terminal he/she were using the card on.

The CDAP Patient Smart Card

The Patient card is a card used **ONLY** by the patient to whom the card was issued. Unlike the pharmacist's card, this card has artwork printed in the background of the card. Also, there is a notice at the back of the card printed. See pictures of the front and reverse sides below:



Top
REVERSE SIDE (Proportion 1:1)
Government of Trinidad and Tobago
This card remains the property of the Government of Trinidad and Tobago and is not to be traded or sold. If lost or found, please report to the nearest police post.

When inserting these cards into the terminal the pharmacist must ensure that they insert it chip first into the terminal with the chip side facing up. A patient can take his/her card and carry it to any pharmacist that can issue a CDAP Prescription. A patient also has to be valid for his/her prescription to be honoured. When the patient's card is first issued, a first use validation is done. This means, when the user inserts the card for the very first time into the terminal, the user would be asked to validate the card online. By pressing **OK,** the terminal would begin dialing to the remote computer to validate the patient's card. As long as a return message states that the card is valid, then the logon is allowed to proceed and a prescription can be made. If however, the return message is Invalid, the card is blocked and the patient cannot use the card.
Every time the patient's card is used, a counter is incremented and upon the 8th use of the card, it has to be validated.

Logging on with the CDAP Smart Card

14-06-2006 10.00
READY
SWIPE / INSERT CARD
or PRESS MENU KEY

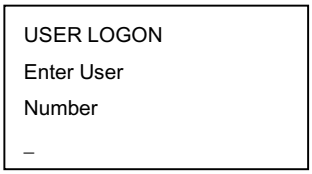
1: From the Ready screen, press **Menu**

MENU
PREPAID AIRTIME
CDAP
System Setup

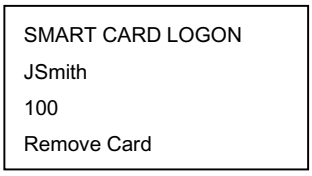
2: Scroll down to **CDAP**. Press **OK** button.

CDAP
Prescription
Reports
Maintenance

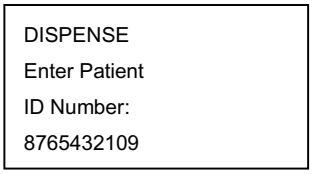
3: Highlight **Prescription**. Press **OK** button.



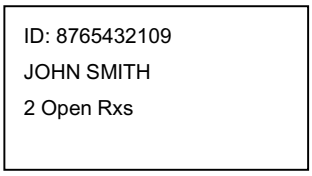
4: Please insert your Pharmacist smart card. Press **OK**.



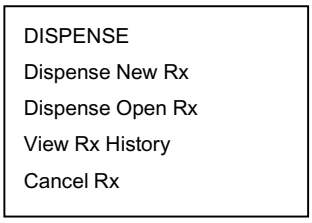
5: Once your ID has been verified, Remove Card.



6: Please insert your patient smart card.



7: The patient's name and ID will be displayed on the screen along with the number of open Rxs that are currently stored on the card.



8: Scroll down to select an option and Press Ok.

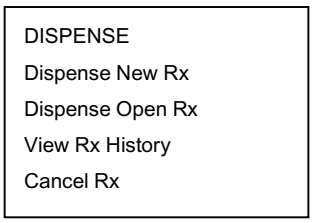
Dispense New Rx – this option allows you to Dispense a new prescription. This new prescription is also saved on the patient smart card.

Dispense Open Rx – this option allows you to dispense a repeat Rx that has already been stored on the card.

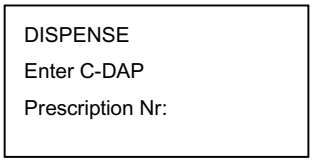
View Rx History – this option allows you to view all open, closed and inactive Rxs stored on the patient smart card.

Cancel Rx – this option allows you to cancel an Rx that you have

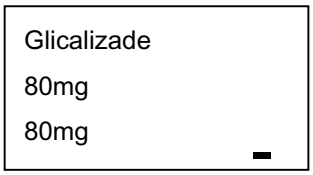
Dispense New Rx (with a Patient Smart Card)



1: Scroll down to Dispense new Rx. Press OK.

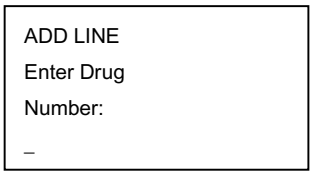


2: Enter the Rx Number located in the top right hand corner of the CDAP Patient Registration form. Press **OK**. Note that the terminal would not allow the user to proceed if the value for Rx Number is '0' or blank.

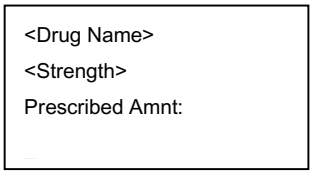


3: The first item in the drug list is displayed. You can Either:

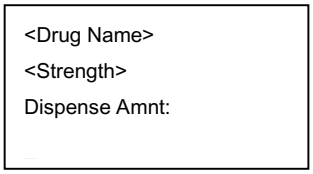
- Scroll down ▼ through the list to find the required drug and Press **OK** OR
- Enter the drug number directly.



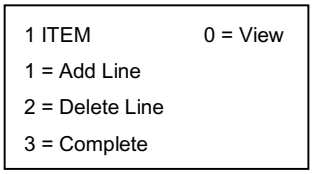
If you enter the drug number, this screen will appear. Enter the drug number from the CDAP drug list that corresponds to the drug you want to dispense. Press **OK**. The screen will display that drug. Press OK to go ahead or simply type in another number if this is not the drug you wanted.



4: Enter the Prescribed quantity of the drug to be dispensed. If the Rx is a repeat Rx, enter the total amount prescribed over the period specified by the doctor. Press **OK**.
[Eg. If the Rx is 30 tablets for 3 months, the prescribed amount will be 90.] If you enter the amount as '0', or blank, then you will be taken back to the drug list.



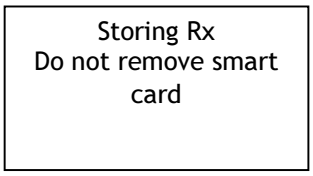
5: Enter the Dispense quantity of the drug to be dispensed. Press **OK**. If nothing is entered i.e. blank, the terminal will continue to prompt for a value until a value >= 0 is entered.



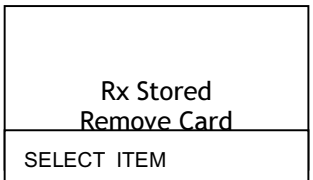
6: To dispense another item on the same prescription, Press 1 and repeat the steps to select the drug and quantity (from step 8).

If you are finished dispensing this prescription, Press 3. The receipt and corresponding labels will be printed.

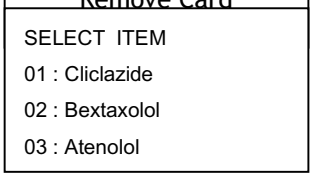
If you would like to view the list of drugs dispensed so far, Press 0. A list of the drugs dispensed so far will be printed on a proforma (incomplete) receipt. .



If you select 3 = Complete, after the receipt is printed, the Rx will be stored to the smart card. Please do not remove the card while the Rx is being stored.

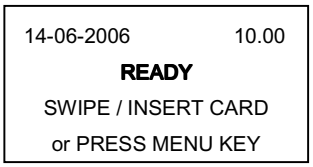


When the Rx is stored to the smart card, the terminal will display the following message. You can now safely remove the patient smart card.

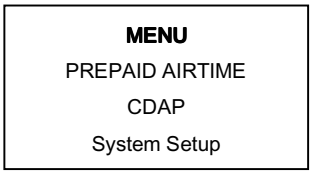


If you need to delete a drug that has already been entered, Press 2. A list of the line items on that Rx will appear. Scroll to the item to be deleted, and press **OK**.

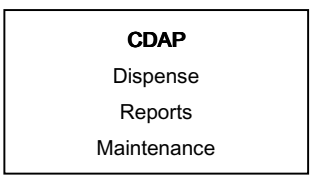
Dispensing a New Rx (without a Patient Smart Card)



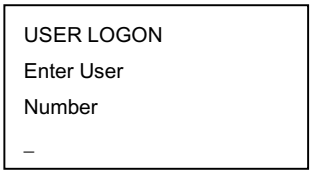
1: From the Ready screen, press **Menu**



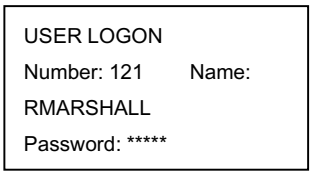
2: Scroll down to **CDAP**. Press **OK** button.



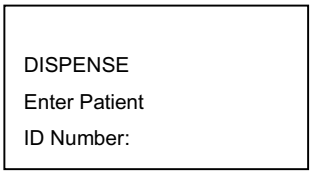
3: Highlight **Dispense**. Press **OK** button.



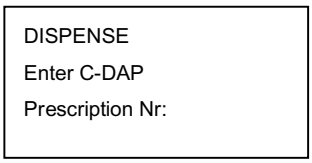
4: Enter your Pharmacist ID. Press **OK**.



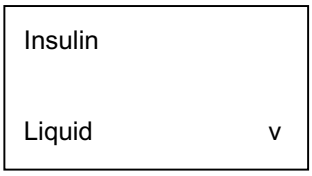
5: Enter your password. Press **OK**.



6. Enter the number of the ID provided by the client. Press **OK** button.

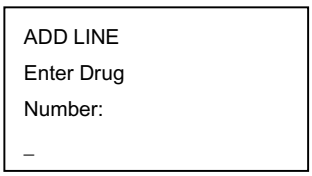


7: Enter the form number from the CDAP prescription. Press **OK** button.

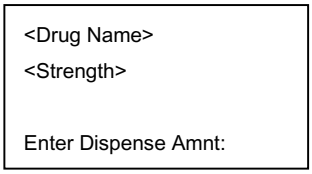


8: The first item in the drug list is displayed. You can either:

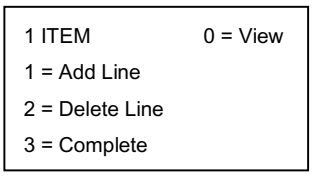
- Scroll down ▼ through the list to find the required drug and Press **OK** OR
- Enter the drug number directly.



If you enter the drug number, this screen will appear. Enter the drug number from the CDAP drug list that corresponds to the drug you want to dispense. Press **OK**. The screen will display that drug. Press OK to go ahead or simply type in another number if this is not the drug you wanted.



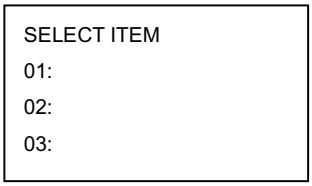
9: Enter the quantity of drug to be dispensed. Press **OK**. Unlike the Smart Card procedure, you are only allowed to enter a Dispense Amount and NOT a Prescribed Amount.



10: To dispense another item on the same prescription, Press 1 and repeat the steps to select the drug and quantity (from step 8).

If you are finished dispensing this prescription, Press 3. The receipt and corresponding labels will be printed.

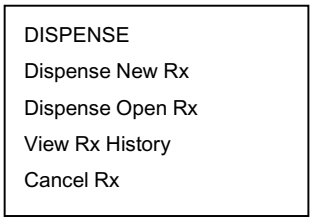
If you would like to view the list of drugs dispensed so far, Press 0. A list of the drugs dispensed so far will be printed on a proforma (incomplete) receipt. .



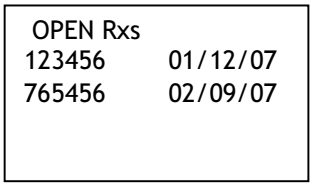
If you need to delete a drug that has already been entered, Press 2. Scroll to the item to be deleted, and press **OK**.

Dispense Open Rx

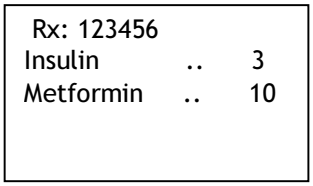
An open Rx is a prescription that contains repeat medication, that is – it has existing drugs to be dispensed after a first time dispense. For example, if you dispense a prescription with prescribed amount as 30 but the dispense amount is 15, this means that there are still 15 tablets of the drug to be dispensed. This constitutes an open Rx.



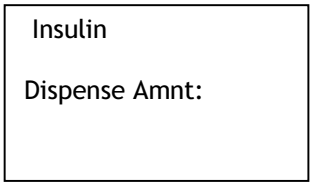
1: Scroll down to Dispense Open Rx. Press OK.



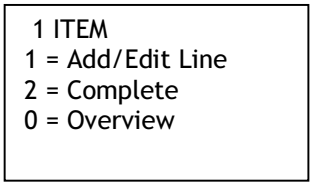
2: Scroll down to the Rx that you would like to Dispense. Press Ok.



3: The terminal will display the drug items in the Rx and their respective balances. Scroll down to the drug that you would like to dispense and press Ok.



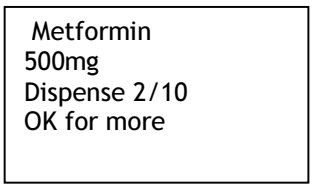
4: Enter the quantity that you would like to dispense. Press Ok. Please note that if you enter a quantity greater than the balance, the terminal will prompt you to enter the dispense amount again.



5: To dispense another item on the same prescription, Press 1 and repeat the steps to select the drug and quantity (from step 3).

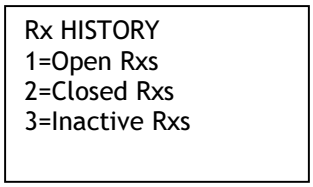
If you are finished dispensing this prescription, Press 3. The receipt and corresponding labels will be printed.

If you would like to view the list of drugs dispensed so far, Press 0. A list of the drugs dispensed so far will be displayed on the terminal. Scroll down to view all drugs or Press **OK**.



Viewing Patient Rx History

This option allows you to view a history of the patient's prescriptions that are stored on the card. The smart card will allow you to view up to 16 previous Rxs.



After logging on to the terminal [see page 2],

1) Scroll down to View Rx History. Press Ok.
2) Press the number of the category of Rxs that you would like view. To view all Open Rxs, press 1. To view all Closed Rxs, press 2. To view all Inactive Rxs, press 3.
3) Scroll down to select the Rx that you would like to view. The Rx number is displayed along with the date that the Rx was first dispensed. Press Ok.
4) Scroll down to view all drug items in the Rx. Press **OK** to print a detailed report of the Rx. The receipt prints the total quantity of the drug prescribed and the amount left to be dispensed (balance)
5) Press Stop to revert to the Rx History menu.
6) The above procedures works in the same way for all three menus in the Rx History menu option.

It should be noted that the card can store up to 16 past prescriptions on the patient smart card. If there are 16 open prescriptions and you want to store a 17th Rx, the terminal will ask you to overwrite or cancel existing prescriptions on the card.

Cancel Rx

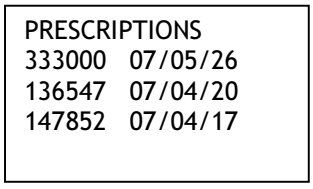
This option allows you to cancel an Rx that has already been dispensed and stored to the card.

Please note that is you have dispensed a prescription that has already been stored on the patient's smart card, there are two steps to cancelling an Rx. You have to

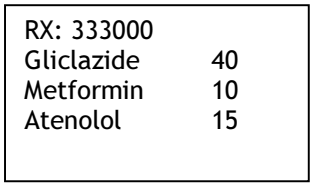
i) cancel the Rx on the smart card
ii) cancel the Rx on the terminal [voiding a claim-see page 10]

After logging on to the terminal [see page 2],

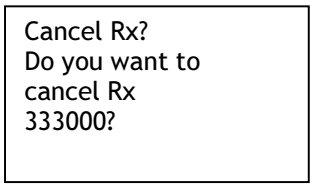
1) Scroll down to Cancel Rx. Press Ok.
2) A list of Rx numbers together with their creation date would be displayed



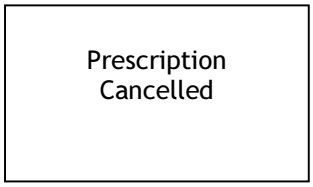
3) Scroll down to the Rx that you would like to cancel. Press Ok.



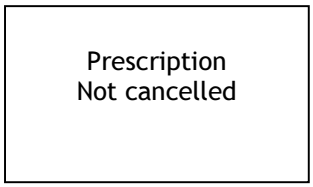
4) Rx will be displayed. If this is the Rx that you would like to cancel. Press Ok.
5) Terminal will display a prompt, 'Cancel Rx? Do you want to Cancel Rx ######?' Press Ok to cancel Rx. Press Stop if you do not wish to cancel Rx.



6) If you press Ok, terminal displays 'Prescription Cancelled.'



7) If you press STOP, the terminal displays 'Prescription Not Cancelled'



Submitting Claims

(Server Connect)

It is recommended that you perform a Server Connect at least once daily in order to upload the information on items and drugs you have dispensed. The information submitted this way is your claim for reimbursement. It will be sent to NIPDEC for claims processing.

To connect to the CDAP server,

1. Press **Menu**
2. Scroll down to **CDAP**. Press **OK**.
3. Scroll down to **Maintenance**. Press **OK**.
4. Highlight **Manager Menu**. Press **OK**.

5. Enter Manager Password. Press **OK**.
6. Scroll down to **Connect Server**. Press **OK**.

Wait a few minutes while the terminal dials the host server. After each connection (Host session), a receipt will be printed.

If you are not sure if the connection was successful, you can repeat the server connect as many times as you wish until you see "data uploading" on the terminal screen. Your claims will not be duplicated—once they have been submitted once, they are not re-submitted.

If you cannot get a connection (e.g. if phone line is not working), your data will be uploaded the next time a connection succeeds. Even if you unplug your terminal, your claims will not be lost.

Reprinting Receipts

If for any reason a receipt has failed to print, or you need a new copy of a receipt you dispensed, the manager can reprint a receipt by receipt number (you must have the number of the receipt you want to reprint).

From the Ready Screen:

1. Press **Menu**
2. Scroll down to **CDAP**. Press **OK**.
3. Scroll down to **Maintenance**. Press **OK**.
4. Highlight **Manager Menu**. Press **OK**.
5. Enter Manager Password. Press **OK**.
6. Highlight **Reprint receipt**. Press **OK**.
7. Enter the receipt number. Press **OK**.
8. The receipt is printed. It is labeled clearly as a "**REPRINT RECEIPT**".

Voiding a Transaction

As was mentioned in a previous section, canceling an Rx occurs in a two stage procedure which must be strictly adhered to. Voiding a transaction cancels an entire transaction and not just the dispensing of one drug in a transaction. You can only perform a cancellation if the transaction has not been uploaded to the server. That is, if you have performed a server connect since the time the prescription was originally dispensed, the claim is already submitted. Please call 800-CDAP to report the claim as void.

To cancel a transaction you recently completed and have not submitted, you need to know the receipt number.

From the Ready Screen:

1. Press **Menu**
2. Scroll down to **CDAP**. Press **OK**.
3. Scroll down to **Maintenance**. Press **OK**.
4. Highlight **Manager Menu**. Press **OK**.
5. Enter Manager Password. Press **OK**.
6. Highlight **Void Transaction**. Press **OK**.

7. Enter Receipt Number. Press **OK**.
8. Receipt is printed showing cancellation.

To return to the Ready screen, press **Stop** until you are back at the starting screen.

Information about your usage

Reports

Dispense Summary Report

This option allows the user to see all the drugs and their respective quantities dispensed.

From the Ready Screen

1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok.**
3. Scroll down to **Reports**. Press **Ok**
4. Highlight **Dispense Summary**. Press **Ok**.
5. Report is printed.

Dispense Detail Report

The Dispense Detail Report allows the user to view each drug dispensed for a particular period specified by the user. To access this report, complete the following steps:

1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok**.
3. Scroll down to **Reports**. Press **Ok.**
4. Scroll down to **Dispense Detail**.
5. Enter the starting date for the report period.
   Use the ▲ and ▼ buttons to change the year and month.
   Press **Ok** when finished.
6. Enter the ending date for the report period. Use the ▼ and ▲ buttons to change the year and month. Press **Ok** when finished.
7. Screen displays report showing drugs dispensed for the period.
8. Use the ▼ and ▲ buttons to scroll through list of details. Press **Ok** at any point to print out list of drugs dispensed for that period.

Uploadable Items Report

The Uploadable Items report allows you to see how many items they have dispensed on the terminal will be uploaded to NIPDEC when you do a Server Connect. This report displays the number of line items dispensed daily. When you perform a Server Connect to upload the claims in this report, the report will have 0 items. The pharmacist should be mindful of the message that prints at the bottom of this report which states that it is not suitable for reconciliation purposes. To access this report, complete the following steps:

1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok**.
3. Scroll down to **Reports**. Press **Ok.**

4. Scroll down to **Uploadable Items**.
5. Press **OK** and an Uploadable Items report will be printed with that heading

Reading Messages from CDAP

(View Messages)

From time to time, Nipdec may wish to inform you of important changes to the programme or your application. The View Emails option allows you to print out these messages and can also confirm to Nipdec that you have received the message.

From the Ready screen:

1. Press **Menu**
2. Scroll down to **CDAP**. Press **OK**.
3. Scroll down to **Reports**. Press **OK**.
4. Scroll down to **View Messages**. Press **OK**.
5. The message or messages are displayed. Scroll down to select one message. Unread messages are marked with a question mark. Press **OK**.
6. The message is printed out and display on the screen. To reply (confirm you received the message), press 1.

Managing IDs and passwords

Changing the Manager Password

It is strongly recommended that you change the manager password from the default as soon as you receive your terminal. The manager ID has access to the passwords of the pharmacist IDs and as such must be handled only by the pharmacy owner or designated pharmacist. Protect this ID by changing it. An important point to note is that the Manager password **MUST be 5 digits long.** The terminal will not accept a password that is less than or greater than 5 digits long.

From the Ready Screen

1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok**.
3. Scroll down to **Maintenance**. Press **Ok**.
4. Highlight **Manager Menu**. Press **Ok**.
5. Enter Manager Password. Press **Ok**.
6. Scroll down to **Change Manager Pin**. Press **Ok**
7. Enter new password. Press **Ok**.
8. Enter password again. Press **Ok**.
9. Message displayed 'New Manager Password Updated.'

To Return to the Ready Screen, press **Stop** until you see the starting display again.

Adding a Pharmacist

This option allows the manager to add a new pharmacist to the terminal.

From the Ready Screen

1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok**.
3. Scroll down to **Maintenance**. Press **Ok**.

4. Highlight **Manager Menu**. Press **Ok**.
5. Enter Manager Password. Press **Ok**.
6. Scroll down to **User Setup**. Press **Ok**
7. Scroll down to **Add User**. Press **Ok**.
8. Enter New Pharmacist ID. Press **Ok**. The pharmacist can be either 1, 2 or 3 digits long. It cannot be longer than 3 digits.
9. Enter Pharmacist Name. Press **Ok**.
10. Enter New Pharmacist Password (Password MUST be 5 digits long). Press **Ok**.
11. Enter New Pharmacist Password again. Press **Ok**.
12. Confirmation message – **<User Number> <User Name> Add?** Press **Ok**.

Deleting a Pharmacist

This option allows the manager to delete a pharmacist from the terminal

From the Ready Screen
Step 1: Press **Menu**
Step 2: Scroll down to **CDAP**. Press **Ok**.
Step 3: Scroll down to **Maintenance**. Press **Ok**.
Step 4: Highlight **Manager Menu**. Press **Ok**.
Step 5: Enter Manager Password. Press **Ok**.
Step 6: Scroll down to **User Setup**. Press **Ok**
Step 7: Scroll down to **Delete User**. Press **Ok**.
Step 8: Enter Pharmacist ID to be deleted. Press **Ok**.
Step 9: Message display – pharmacist has been deleted.

Changing Pharmacist Password

This option allows the manager to change a pharmacist's password

From the Ready Screen
1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok**.
3. Scroll down to **Maintenance**. Press **Ok**.
4. Highlight **Manager Menu**. Press **Ok**.
5. Enter Manager Password. Press **Ok**.
6. Scroll down to **User Setup**. Press **Ok**
7. Scroll down to **Change User Pin**. Press **Ok**.
8. Enter Pharmacist ID whose Password is to be changed. Press **Ok**.
9. Message display: **Change Password <user number> <user name> Continue?** Press **Ok**.
10. Enter new Password. Press **Ok**.
11. Enter new Password again. Press **Ok**.
12. Password has been updated.

Printing a Pharmacist User List

This option allows the manager to print a list of the pharmacists who are registered on the terminal. This list prints the pharmacist number and name.

From the Ready Screen
1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok**.
3. Scroll down to **Maintenance**. Press **Ok**.
4. Highlight **Manager Menu**. Press **Ok**.
5. Enter Manager Password. Press **Ok**.
6. Scroll down to **User Setup**. Press **Ok**
7. Scroll down to **User List**. Press **Ok**.
8. User List is printed with Pharmacist Number and Pharmacist Name

Unblocking a Pharmacist

This option allows the manager to unblock a pharmacist. A pharmacist can become blocked if they have entered an invalid password more than 5 times.

From the Ready Screen
1. Press **Menu**
2. Scroll down to **CDAP**. Press **Ok.**
3. Scroll down to **Maintenance**. Press **Ok**.
4. Highlight **Manager Menu**. Press **Ok**.
5. Enter Manager Password. Press **Ok**.
6. Scroll down to **User Setup**. Press **Ok**
7. Scroll down to **Unblock User**. Press **Ok**.
8. Enter Pharmacist Number who needs to be unblocked. Press **Ok**.
9. Message display: **Unblock User <usernumber> <username> Continue?** Press **Ok**.
10. User is Unblocked.

Terminal Maintenance

Changing the Paper Roll

Step 1: Lift the paper clip to release the flap
Step 2: Remove the old paper roll
Step 3: Insert new paper roll and pull paper until enough is visible. Ensure that the paper rolls from the bottom of the roll through to the output.
Step 4: Close the flap unlit you hear a 'click' sound
Step 5: Press the paper feed key (bottom left button) to feed paper

Other Technical Support

Need Help ???

The NIPDEC support line is available for all of your support needs. Before calling for technical questions, it is recommended that you check the following:

- Your **power** connection. Is the terminal plugged in properly and is this outlet functioning currently?
- Your **phone** line. Is the phone line plugged in fully and is the phone line free? (i.e., not being used by another machine, e.g. fax or Linx machine).
- Your printer cable plugged in fully to the terminal

- Your printer is plugged in properly and is this outlet functioning currently?

Please feel free to call the NIPDEC help line at 800-CDAP